Establish Case – PLCO/Support PLCO

Training Document

This training document demonstrates how to Establish a Plant Clearance Inventory Schedule document as a Plant Clearance Officer (PLCO) or Support PLCO. Inventory Schedules are submitted to PLCO/Support PLCO from a Contractor Property Manager and after they are accepted a Case can be established.
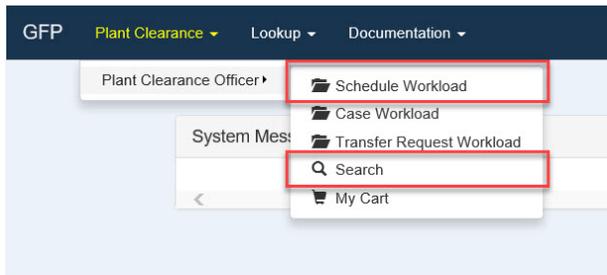
Roles	The following GFP user roles have the ability to establish a Case from an accepted Inventory Schedule in the GFP Module: • Plant Clearance Officer • Support Plant Clearance Officer
Navigation	Log into PIEE and access the GFP module. In the GFP module, navigate to Plant Clearance > Plant Clearance Officer/Support Plant Clearance Officer > Schedule Workload. Alternatively, navigate to the GFP module and navigate to Plant Clearance > Plant Clearance Officer/Support Plant Clearance Officer > Search. **Schedule Workload Search Results:** The Schedule Workload displays all Inventory Schedules assigned to the PLCO/Support PLCO user. Select the **Create Case** link under the Action(s) column to begin the Case establishment process.

Search Criteria:

On the Search Criteria screen, check the Inventory Schedule and enter at least one input field. Select the **Search** button to retrieve results.

The Search Results will display all Inventory Schedules assigned to the PLCO/Support PLCO user. Select the **Create Case** link under the Action(s) column to begin the Case establishment process.

Case – Header	The Case Header screen displays the Contraction Information, Case Information, and Schedules being used for establishing the Case. Contract Information is read-only.
	Case Information:
	• Case DoDAAC *
	• Case Type
	• Service/Agency *
	• Administrative Agency *
	• Remarks
	* Required

The Schedules section lists the Inventory Schedule being used to establish a Case.
Select the **Open** button under the Action(s) column to open the Inventory Schedule, review the document, and apply Screener Rules to the Line Items.

Schedules

Show [10 ▾] entries

Schedule Reference Number	Line Item Count	Total Acquisition Cost	Action(s)
Filter	Filter	Filter	
2AAE1-064812020082011	2	200	⬆ Open

Showing 1 to 1 of 1 entries

Previous **1** Next

* = Required Fields, † = Conditional.

Case – **Inventory** **Schedule**	Upon selecting the Open link, the Inventory Schedule Header tab is displayed. The document information may be reviewed but cannot be changed. If changes are required, refer to the 'Plant Clearance Document – Unaccept' training. The Screener Rules tab contains the Line Items, and the Screener Rules may be updated here. Screener Rules may be added to accepted Inventory Schedules before the Case establishment process by opening the accepted Inventory Schedule, updating the Screener Rules tab, and saving. Refer to the 'Applying Screener Rules – PLCO/Support PLCO' training document for PLCO and Support PLCO users. If no Screener Rules are applied at this time, they are required before completing the Case establishment process.

Plant Clearance Officer - View Plant Clearance Inventory Schedule

| Header | Line Item | Screener Rules | Documentation | History |

Contract Information ⌄

Contract Number Type	Contract Type	Contract Number	Contract Order Number	Prime CAGE
Cooperative Agreement	BOA/BPA	20082011	20082011	2AAE1

Inventory Schedule ⌄

Total Acquisition Value
200.00

Header Information

Schedule Reference Number	Alternative Schedule Reference Number
2AAE1-064812020082011	54765476

Program Title	Scrap List	Termination	Termination Docket Number
pt	Yes	Yes	897689769876987

Final Schedule	Property Type ⓘ	Is the property allocable to a FMS contract/FMS portion of a contract?
Yes	GFP	No

⊙ Download Excel   ⊕ Return to Case

Continue to the **Screener Rules** tab to review the Line Items and Screener Rules.

Case – Apply Screener Rules	On the Screener Rules tab, all Line Items on the Inventory Schedule are listed. If Screener Rules were previously applied to the Line Items, they will appear in the Screener Rules column of the table. If there are already Screener Rules present, they may be changed at this time by the PLCO/Support PLCO.

Select an option from the **Screener Rules** dropdown:
- 001 – Standard Screening (DoD for 20 days, followed by GSA for 26 days)
- 002 – Special Screening (DoD for 20 days)
- 006 – GSA-Only Screening (GSA for 26 days)
- 999 – No Screening

After selecting a Screening Rule, select one of the following:
- **Apply to Selected** – Apply rules to all selected Line Items.
- **Apply to Blank** – Apply rules to all unchecked Line Items simultaneously.
- **Apply to All** – Apply rules to ALL Line Items simultaneously.

After reviewing/updating Screener Rules, selecy the **Apply Screener Rules** button at the bottom of the page to save the applied Screener Rules. A success message will be displayed to confirm successful application of Screener Rules.

After applying Screener Rules to the Line Items, select the **Return to Case** button at the bottom of the screen on any tab.

Plant Clearance Officer - View Plant Clearance Inventory Schedule

Screener Rules have been applied to line items.

Header	Line Item	Screener Rules	Documentation	History

Contract Information

Inventory Schedule

Screener Rules

This screen allows you to apply screener rules to line items in the inventory schedule.

To apply a rule to selected line items, mark the checkbox for each line item, select the rule from th

To apply a rule to all blank line items simultaneously, select the rule from the Screener Rule drop-

To apply a rule to ALL line items simultaneously, select the rule from the drop-down list, and then

Press the Apply Screener Rules buttton at the bottom to save the Screener Rules applied.

001 - Standard Screening (DoD for 20 days, followed by GSA for 26 ⌄   ☑ Apply to Selecte

Show [10 ⌄] entries

Select	Line ID	Line No.	Item Name	Item Desc
	Filter	Filter	Filter	Filter
☑	263896	1	Test Item Name	test

☑ Apply Screener Rules   ⊕ Download Excel   ⊕ Return to Case

Case – **Establish Case**	The Case can be established after all Line Items have Screener Rules applied to them. On the Case Header page, select the **Establish Case** button to confirm Case establishment.

Remarks

Good to go with Case Establishment

Schedules

Show [10 ▾] entries

Schedule Reference Number	Line Item Count	Total
Filter	Filter	Filter
2AAE1-064812020082011	2	200

Showing 1 to 1 of 1 entries

[☑ Establish Case] [● Previous]

The Confirm Establishment of Case pop-up is displayed.

Confirm Establishment of Case

Are you sure you want to establish this plant clearance case?

[**OK**]   [Cancel]

Select the **OK** button to continue with the Case establishment.

Case – **Establish Case** **Success**	A success message will be displayed with Contract information, Case Number, and notifications of emails sent. The Case will appear in the PLCO/Support PLCO's Case Workflow folder in read-only mode.
	The Line Items from the established Cases will be viewable to the appropriate parties based on the Screener Rules applied. PLCOs, Support PLCOs, and DoD Screeners may now create Transfer Requests from these Line Items on established Cases.

Plant Clearance Officer - Plant Clearance Case

The Plant Clearance Case was successfully established.

Contract Number	Contract Order Number	Prime CAGE	Case Number
20082011	20082011	2AAE1	S0512A-010720

INFO: Email sent to Contractor Property Manager: TomHoward@Bethesda.com.
INFO: Email sent to Contractor Property Manager Organizational Email: RickA@roll.com.